United Nations ST/AI/2011/4

Secretariat

27 May 2011

# Administrative instruction

## Education grant and special education grant for children with a disability

The Under-Secretary-General for Management, pursuant to section 4.2 of Secretary-General's bulletin ST/SGB/2009/4, and for the purpose of implementing staff rule 3.9 (see ST/SGB/2011/1), promulgates the following:

## I. Education grant

### Section 1
### Eligibility

1.1 Staff members who are regarded as international recruits under staff rule 4.5 and who hold a fixed-term, continuing or permanent appointment shall be eligible for the education grant in accordance with the provisions of staff rule 3.9 and the present instruction.

1.2 Staff members assigned to non-family duty stations are not authorized to have their dependent children reside with them and attend a school in the same non-family duty stations to which they are assigned.

1.3 Staff members eligible for the education grant solely because of a change of duty station as provided by staff rule 4.8 shall also be subject to the following conditions:

(a) The staff member is assigned for a minimum period of six months from one duty station to another or, if initially for less than six months, is extended so that the continuous period of assignment is at least six months;

(b) The education grant will be payable only in respect of the staff member's period of assignment under section 1.3 (a) above.

### Section 2
### Conditions of entitlement

Eligible staff members may claim the education grant when the following conditions are met:

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(a) The child is in full-time attendance at an educational institution at the primary level or above while the staff member is in the service of the United Nations. Education shall be deemed "primary" for the purposes of this instruction when the child is five years or older at the beginning of the school year, or when the child reaches age five within three months of the beginning of the school year;

(b) The entitlement shall terminate when the child ceases to be in full-time attendance at an educational institution or completes four years of post-secondary studies. The four-year post-secondary count shall begin from the first year of studies following the High School Diploma even if part of the post-secondary studies is completed prior to the staff member's service with the Organization;

(c) There shall be no entitlement beyond the scholastic year in which the child reaches the age of 25, unless the child's education has been interrupted for more than one year by compulsory national service, illness or other compelling reason. In such cases, the grant may be extended for the period of interruption beyond the scholastic year in which the child reaches the age of 25.

## Section 3
## Admissible and non-admissible educational expenses

*Admissible expenses*

3.1 Expenses for full-time school attendance that are paid directly to the school or are certified by the school as being necessary for school attendance shall be admissible. They may include charges for daily group transportation to and from the school, if provided by the school or organized on a school-wide basis by a concern other than the school itself.

3.2 Expenses for board shall be admissible under the following conditions:

(a) When a child attends an educational institution outside the "duty station", as defined by staff rule 3.9 (a) (iv);

(b) When a child attends an educational institution beyond commuting distance from the area where the staff member is serving and, in the opinion of the Secretary-General, no school in the area would be suitable for the child.

3.3 Expenses for textbooks shall be admissible when the educational institution certifies that the textbooks were not provided free of charge.

3.4 Expenses for private tuition in the mother tongue of the staff member may be admissible when the following conditions are met:

(a) Private tuition is given by a qualified teacher certified in the language of instruction who is not a member of the staff member's family;

(b) The staff member serves in a country whose language is different from his or her mother tongue;

(c) The child attends a local school in which the instruction is given in a different language from the staff member's mother tongue.

*Non-admissible expenses*

3.5 The following expenses shall be considered non-admissible, except as otherwise indicated below:

(a) Expenses for education received before a child reaches primary level, as defined in section 2 (a) of the present instruction;

(b) Expenses for attendance at a free school or one charging only nominal fees at the duty station. In such cases, however, expenses for midday meals and transportation may be reimbursed under section 3.1, boarding expenses may be reimbursed under section 3.2, and textbook expenses may be reimbursed under section 3.3 of the present instruction;

(c) Expenses for correspondence courses, including Internet-based courses, except where such courses are the only available substitute for full-time attendance at a school of a type not available at the duty station, or where such courses are related to academic subjects that are not included in the regular school curriculum but are required for the child's subsequent education. Subject to prior written approval, expenses incurred in those cases shall be treated as an admissible cost of attendance under section 4.1 of the present instruction;

(d) Expenses for private tuition, except when provided by a teacher qualified in the subject concerned who is not a member of the staff member's family, and when the private tuition is given in the following cases:

(i) For tuition in the language of the duty station, when the local school certifies that this is a precondition for admittance;

(ii) As a required supplement to correspondence courses for which expenses are admissible under section 3.5 (c);

(iii) As a required supplement to the regular school programme, for special coaching in a subject taught by the school to make up for deficiencies attributable to the child's change of schooling as a result of expatriation or a change of the staff member's official duty station, or for special coaching in an academic subject not included in the school curriculum but required for the child's subsequent education;

(e) Expenses for apprenticeship or other similar arrangement, except when it involves full-time schooling, and provided in that case that the child receives no payment for services rendered;

(f) Expenses for summer courses, except when the school certifies that such courses are a prerequisite for further attendance during the subsequent regular school year and for the school's regular diploma.

*Scholarships, bursaries or similar grants*

3.6 All scholarships, bursaries or similar grants received by or for the child shall be deducted first from those education expenses which are not admissible, and the balance, if any, from the admissible educational expenses before the amount of the grant is computed under section 4 below. Financial assistance in the form of loans to assist in the payment of educational expenses, which have to be reimbursed by the staff member or the child to a financial institution, shall be considered as payments made to the school by the staff member.

3.7 In cases where the child is studying in a school located in the country of the staff member's duty station, the cost of the child's rental accommodation outside of the school campus that is not certified by the school as an education expense on the P.41 form shall remain a non-admissible education expense that cannot be adjusted against scholarships, bursaries and similar grants.

## Section 4
## Amount of the grant

4.1 When the child attends an educational institution at the duty station:

(a) The amount of the grant shall be 75 per cent of the admissible costs of attendance up to the maximum per year specified in the annex to the present instruction, with a maximum grant per child and academic year as indicated in column 2 of the annex;

(b) When the educational institution is located beyond commuting distance from the area where the staff member is serving and, in the opinion of the Secretary-General, no school in that area would be suitable for the child, the amount of the grant shall be calculated at the same rates as in section 4.2 below.

4.2 When the child attends an educational institution outside the duty station, the amount of the grant shall be as follows:

(a) Where the educational institution provides board, 75 per cent of the sum of the expenses for attendance and board up to the maximum per year indicated in column 1 of the annex, with a maximum grant per year as indicated in column 2 of the annex for each child;

(b) Where the educational institution does not provide board, the amount of the grant shall be the sum of the flat sum for board as indicated in column 3 of the annex, plus 75 per cent of the expenses for attendance up to the maximum set out in column 6 of the annex, with a maximum grant per year as indicated in column 2 of the annex for each child.

4.3 An additional amount for boarding expenses may be paid to staff members who are at designated duty stations and who are entitled to additional education grant travel under section 8.3 of the present instruction, in respect of children attending school at the primary or secondary level. This amount, in addition to the normal grant indicated in column 2 of the annex, may cover 100 per cent of boarding expenses up to the amount specified in column 4 of the annex, so as not to exceed the maximum total grant set out in column 5 of the annex.

4.4 Admissible expenses for textbooks shall be reimbursed up to a maximum of 75 per cent of the fixed rates for the primary, secondary and post-secondary levels as set out in the information circular on the education grant issued by the Assistant Secretary-General for Human Resources Management (see ST/IC/2005/25).

4.5 When expenses for tuition in the mother tongue are admissible under section 3.4 of this instruction, they may be reimbursed up to 75 per cent of the expenses incurred, subject to the following maximum amounts:

(a) The maximum amounts listed in column 3 of the annex in the case of individual tuition, and half those amounts in the case of group tuition;

(b) When an education grant is otherwise payable on account of the child, the maximum amounts listed in column 2 of the annex.

4.6 When expenses for summer courses are admissible under section 3.5 (f) of the present instruction, they may be reimbursed as part of the admissible expenses incurred for the prior school year, subject to all applicable maximum amounts.

## Section 5
## Prorating of amount of the grant

5.1 The amount of the grant relating to expenses for school attendance, including the flat sum for board and the fixed rate for books, shall be prorated based on the period of school attendance, or the period of service of the staff member, compared to the full school year when the period of attendance or service covers less than two thirds of the school year.

5.2 When prorating is required, it shall normally be effected in the proportion which the period of attendance or service bears to the normal school year. For that purpose, periods of more than 20 days shall be taken as a full month, and 11 to 20 days as half a month. Periods of 10 days or less shall be ignored. However, when the school charges fees at different rates for various parts of the year, this shall be reflected in prorating the amount of the grant.

5.3 In accordance with staff rule 3.9 (f), no prorating shall be required when the staff member dies while in service after the beginning of the school year.

## Section 6
## Advances against the education grant

6.1 Staff members who are entitled to the education grant and who are required to pay all or a portion of the full-time school attendance expenses at the beginning of the school year may apply for an advance against their entitlement. No advance shall be payable with respect to the flat sum for board.

6.2 Any paid advance shall be considered as due from the staff member until the education grant claim has been received and processed or is recovered from the staff member. Staff members are required to submit their claims for payment of the grant promptly, as required by section 7.1 of the present instruction. Recovery from the staff member's emoluments shall take place after the third and fourth month of the end of the academic year with regard to Headquarters and field staff, respectively, or on separation from service. Similar arrangements will be made for staff on other payrolls.

6.3 No advance shall be authorized for subsequent school years until previous education grant advances have been cleared by settlement of the relevant education grant claim or repayment of the advance previously authorized.

6.4 Requests for education grant advances shall be made in accordance with the procedures set out in information circular ST/IC/2005/25.

## Section 7
## Claims for payment of the education grant

7.1 Claims for payment of the education grant shall be submitted promptly upon completion of the school year. However, when the staff member's appointment expires earlier, the staff member shall submit the claim before the date of separation from service. When the child's attendance ceases before completion of the school year, the staff member shall submit the claim within one month of cessation of the child's attendance.

7.2 Claims for the education grant shall be made in accordance with the procedures set out in information circular ST/IC/2005/25.

## Section 8
## Education grant travel

8.1 Staff members eligible for education grant travel under staff rule 3.9 (g) shall be entitled to travel expenses for the child for one round trip each scholastic year between the educational institution and the duty station, subject to conditions set out below:

(a) The child's attendance at the educational institution is at least two thirds of the school year;

(b) The travel is undertaken during, or immediately before and after the school year;

(c) The child spends at least seven days at the duty station;

(d) Travel expenses may not exceed the cost of travel between the staff member's home country and his or her duty station;

(e) Education grant travel may not take place within three months of travel on home leave by the child except that:

(i) At the staff member's request, home leave for the child and education grant travel may be combined provided the requirement of section 8.1 (c) on minimum period of stay is met;

(ii) The three-month interval may be reduced to permit education grant travel to take place in the same year as home leave travel, or to allow the child to go to the educational institution following travel to join the staff member at the duty station;

(f) In the event the staff member dies while in service after the beginning of the school year, the entitlement to education grant travel shall continue until the end of the school year and may be authorized for travel between the educational institution and the duty station, or another location, subject to the maximum allowed in section 8.1 (d).

8.2 Notwithstanding the provisions of section 8.1, no education grant travel shall be authorized to or from a mission area duty station designated as a non-family mission in respect of any staff member. In this case, education grant travel will be exercised in accordance with the provisions of section 8.7 below.

8.3 Staff members whose parent duty station is included among the duty stations designated by the International Civil Service Commission as giving rise to additional education grant travel may be entitled to such travel twice in the year in which there is no entitlement to home leave, subject to the conditions set out in section 8.1 above. The list of designated duty stations is set out in the information circular entitled "Classification of duty stations and special entitlements for staff members serving at designated duty stations" (see ST/IC/2009/25). For those duty stations that also qualify for home leave on a 12-month cycle, the additional education grant travel may only be exercised if the staff member waives his or her entitlement to home leave in that year.

8.4 When, during a single school year, a child attends two schools, one at the duty station and the other away from the duty station, education grant travel may be authorized in respect of attendance away from the duty station, provided that attendance is for at least one term and there is a valid reason for the change of school.

8.5 In the school year in which the child completes the fourth year of post-secondary studies, travel may be undertaken during the school year or at its end, provided that the child has been in full-time attendance for at least two thirds of that year.

8.6 When a child is over the age of 22 and his/her dependency status has ceased, authorization of education grant travel to or from the duty station after the end of the last school year for which the education grant is payable shall be in lieu of the one-way travel authorized under staff rule 7.2 (e).

8.7 (a) In accordance with staff rule 3.9 (g), a staff member to whom an education grant is payable in respect of his or her child's attendance at an educational institution shall be entitled to travel expenses for the child of one return journey each scholastic year between the educational institution and the duty station. If travel to the duty station by the child is not possible, return travel by the staff member or spouse may be authorized in lieu of travel by the child, provided the following conditions are met:

(i) The travel expenses borne by the Organization do not exceed the amount that would have been paid for the child or children. Other costs that may be payable, such as terminal expenses, are paid at the child rate;

(ii) No travel time is granted, all working days away from the office are charged to annual leave;

(iii) The staff member and/or his/her spouse spend a minimum of seven days at the place of study;

(b) Staff members and/or their spouses may exercise only one return travel per year to a place of study of an eligible child under the provisions of this section. For administrative purposes, such travel shall be charged as education grant travel. Annual leave for the staff member taken for this purpose shall be approved subject to the needs of service, pursuant to staff rule 5.1;

(c) The education grant travel that may exist in respect of other children can be exercised by those children between their own place of study and the place of study of the child whom the parent will visit, provided the expense borne by the

Organization does not exceed the maximum that would otherwise have been applicable.

### Section 9
### Accuracy of information and record-keeping

9.1 When submitting a request for education grant advance or for payment of the education grant, staff members shall ensure the accuracy and completeness of the information being provided to the United Nations, and promptly correct any erroneous information or estimates that they may have previously submitted. Documentation provided by an educational institution may not be altered by the staff member. Incorrect, untrue or falsified information, as well as misrepresentation or partial disclosure, may result not only in the rejection of a claim and/or recovery of overpayments but also in disciplinary measures under the Staff Rules and Regulations (see ST/SGB/2011/1).

9.2 Staff members shall retain, for a period of five years counting from the date of submission of the education grant settlement claim, all substantiating documentation, such as invoices, receipts, cancelled cheques and bank statements documenting expenditures. Such documentation shall be produced if requested by the Organization.

## II. Special education grant for children with a disability

### Section 10
### Eligibility

Staff members shall be eligible for the special education grant in accordance with the provisions of staff rule 3.9 (j).

### Section 11
### Conditions of entitlement

11.1 Eligible staff members may claim the special education grant upon certification by the Medical Services Division that one of the following conditions has been met:

(a) The child is unable, by reason of physical or mental disability, to attend a regular educational institution and therefore requires special teaching or training, on a full or part-time basis, to prepare him or her for full integration into society;

(b) The child, while attending a regular educational institution, requires special teaching or training to assist him or her in overcoming the disability.

11.2 The entitlement shall commence from the date on which the special teaching or training is required and shall terminate when the child is awarded the first recognized post-secondary degree or up to the end of the academic year in which the child reaches the age of 28, whichever is earlier.

## Section 12
## Admissible educational expenses

The following educational expenses shall be admissible:

(a) Expenses required to provide an educational programme designed to meet the needs of the child with a disability so that he or she may attend the highest level of functional ability. These expenses may include:

(i) Charges for teaching or training services;

(ii) Other costs or fees directly related to the educational programmes that are not optional or related to extracurricular activities, except for inadmissible expenses set out in an information circular;

(iii) Expenses for special equipment for educational purposes if not covered under health insurance;

(iv) Expenses for full board (food and lodging) in the case of a child attending an educational institution at the duty station when such boarding is an integral part of the educational programme;

(b) Expenses incurred for local transportation required for the child with a disability.

## Section 13
## Amount of the grant

13.1 The amount of the grant for each child with a disability shall be 100 per cent of the admissible educational expenses actually incurred, subject to the following maximum amounts:

(a) The overall maximum amounts of the grant shall be as indicated in column 1 of the annex;

(b) Within the applicable overall maximum amount:

(i) Expenses for special equipment will be reimbursed up to a maximum of one third of the corresponding amount indicated in column 4 of the annex;

(ii) Expenses for local transportation normally provided by the institution shall be reimbursed up to an amount equivalent to twice the cost of normal group transportation under section 3.1 above.

13.2 In the computation of the special education grant, the amount of admissible educational expenses shall be reduced by the amount of any benefits that may be available from other sources for the child's education and training, which shall be reported as required by section 15.1.

13.3 The grant shall be computed on the basis of the calendar year if the child is unable to attend a regular educational institution or on the basis of the school year if the child is in full-time attendance at a regular educational institution while receiving special teaching or training.

13.4 If attendance of the child is for less than two thirds of the school year, or the period of service during which a staff member is eligible for the grant does not

cover the full school year, the amount of the grant relating to expenses for school attendance shall be prorated in the proportion which the period of attendance or service bears to the full school year. Calculation of the grant for purposes of this section shall follow the provisions of section 5.

## Section 14
## Relationship with the regular education grant

14.1 When a child with a disability is unable to attend a regular educational institution or attends on a full-time basis a regular educational institution that provides the necessary special arrangements for the child, admissible educational expenses shall be reimbursed against the special education grant, regardless of whether the staff member would otherwise be entitled to a regular education grant in respect of the child.

14.2 When a child with a disability is in full-time attendance at a regular educational institution and no special arrangements are made at that institution for the child concerned, reimbursement shall be subject to the following conditions:

(a) If the staff member is entitled to the regular education grant with respect to the child, admissible expenses incurred at the educational institution shall be reimbursed against the normal education grant entitlement at the 75 per cent rate. Additional admissible educational expenses incurred for special teaching and training outside the educational institution shall be reimbursed against the special education grant at the 100 per cent rate. The combined total of the two types of grant shall not exceed the amount specified in column 1 of the annex;

(b) If the staff member is not entitled to the regular education grant with respect to the child, admissible educational expenses incurred for special teaching and training outside the educational institution shall be reimbursed against the special education grant at the 100 per cent rate, subject to the maximum amount specified in column 1 of the annex.

14.3 An additional amount for boarding expenses in respect of children with a disability attending a primary or secondary school may be paid to eligible staff members who serve at designated duty stations, as defined by section 8.3 of the present instruction. This amount may cover 100 per cent of boarding expenses up to the amount specified in column 4 of the annex. The combined amount of the total grant shall not exceed the sum of columns 1 and 4 of the annex.

## Section 15
## Claims for payment of the special education grant

15.1 Claims for the special education grant shall be supported by medical evidence satisfactory to the Secretary-General regarding the child's disability. The staff member shall also be required to provide evidence that he or she has exhausted all other sources of benefits that may be available for the education and training of the child in order to allow for *computation of the grant under section 13.2 of this* instruction.

15.2 When the child is not in school attendance, the claim for payment of the special education grant shall be submitted annually within one month of the end of the standard school year in the staff member's duty station. When the child is in school attendance, claims shall be submitted in accordance with the provisions of section 7.1 above.

15.3 The provisions of the regular education grant regarding advances and accuracy of information and record-keeping in sections 6 and 9 above shall apply to the special education grant.

15.4 Claims for the special education grant shall be made in accordance with the procedures set out in information circular ST/IC/2005/25.

## Section 16
## Travel

16.1 When the needs of the child with a disability require attendance at an educational institution beyond commuting distance from the duty station or outside the duty station, travel expenses shall be paid for up to two round trips per school year between the educational institution and the duty station.

16.2 In exceptional circumstances, travel expenses may also be reimbursed for one person accompanying the child with a disability who cannot travel alone due to the disability.

## Section 17
## Final provisions

17.1 This instruction shall enter into force on 1 June 2011.

17.2 Administrative instruction ST/AI/2004/2 of 24 June 2004 is hereby abolished.

(*Signed*) Angela **Kane**
Under-Secretary-General for Management

# Annex

## Education grant entitlements applicable in cases where educational expenses are incurred in specified currencies and countries

### (Effective as from the school year in progress on 1 January 2011)

| Currency | (1) Maximum amount admissible educational expenses and maximum grant for disabled children | (2) Maximum education grant | (3) Normal flat rate when boarding not provided | (4) Additional flat rate for boarding (at designated duty stations) | (5) Maximum grant for staff members serving at designated duty stations | (6) Calculation for maximum admissible educational expenses (attendance only) |
|---|---|---|---|---|---|---|
| Euro | | | | | | |
| Austria | 17 555 | 13 166 | 3 776 | 5 664 | 18 830 | 12 520 |
| Belgium | 15 458 | 11 593 | 3 518 | 5 277 | 16 870 | 10 767 |
| France[a] | 10 981 | 8 236 | 3 052 | 4 578 | 12 814 | 6 912 |
| Germany | 19 563 | 14 672 | 4 221 | 6 332 | 21 004 | 13 935 |
| Ireland | 17 045 | 12 784 | 3 112 | 4 668 | 17 452 | 12 896 |
| Italy | 20 830 | 15 623 | 3 147 | 4 721 | 20 344 | 16 634 |
| Luxembourg | 15 458 | 11 593 | 3 518 | 5 277 | 16 870 | 10 767 |
| Monaco | 10 981 | 8 236 | 3 052 | 4 578 | 12 814 | 6 912 |
| Netherlands | 17 512 | 13 134 | 3 875 | 5 813 | 18 947 | 12 345 |
| Spain | 16 653 | 12 490 | 3 162 | 4 743 | 17 233 | 12 437 |
| Danish krone | 113 554 | 85 166 | 27 242 | 40 863 | 126 029 | 77 231 |
| Japanese yen | 2 324 131 | 1 743 098 | 607 703 | 911 555 | 2 654 653 | 1 513 860 |
| Swedish krona | 157 950 | 118 462 | 26 034 | 39 051 | 157 513 | 123 238 |
| Swiss franc | 31 911 | 23 933 | 5 540 | 8 310 | 32 243 | 24 524 |
| Pound sterling | 24 941 | 18 706 | 3 690 | 5 535 | 24 241 | 20 021 |
| United States dollar (in the United States of America)[b] | 43 006 | 32 255 | 6 083 | 9 125 | 41 380 | 34 895 |
| United States dollar (outside the United States of America)[c] | 20 663 | 15 497 | 3 746 | 5 619 | 21 116 | 15 668 |

[a] Except for the following schools, where the United States dollar (in the United States of America) level will be applied: American School of Paris, American University of Paris, British School of Paris, European Management School of Lyon, International School of Paris, Marymount School of Paris, École Active Bilingue Victor Hugo and École Active Bilingue Jeannine Manuel.

[b] Also applies, as a special measure, for China, Hungary, Indonesia, Romania and the Russian Federation.

[c] Includes Norway and Finland, which will no longer be tracked as a separate zone.